HOST   ATM

(A) ——→
                                    18
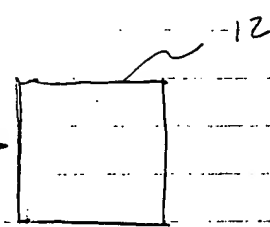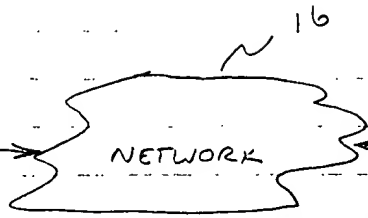   - IDLE - PROMPT CARD ENTRY
                                    - READ CARD (PAN) ~20
                                    - PROMPT PIN ENTRY ~22
                                    - RECEIVE PIN ~24
(B) ——→
                                    - PROMPT TX SELECTION ~26
                                    - RECEIVE TX SELECTION ~28
                                    - PROMPT ACCT SELECTION ~30
                                    - RECEIVE ACCT SELECTION ~32
                                    - PROMPT $ ENTRY ~34

        REQUEST   38   - RECEIVE $ ENTRY ~36
←—————————————————————
- VERIFY
  PIN / PAN / AMOUNT   - PRESENT "WAIT" SCREEN
        40   42
        RESPONSE
—————————————————————→
                       44   - RUN CASH DISENSER ~46
                                   - PRINT RECEIPT ~48
                                   - PRINT JOURNAL RECORD ~50
                                   - PROMPT TAKE CASH ~52
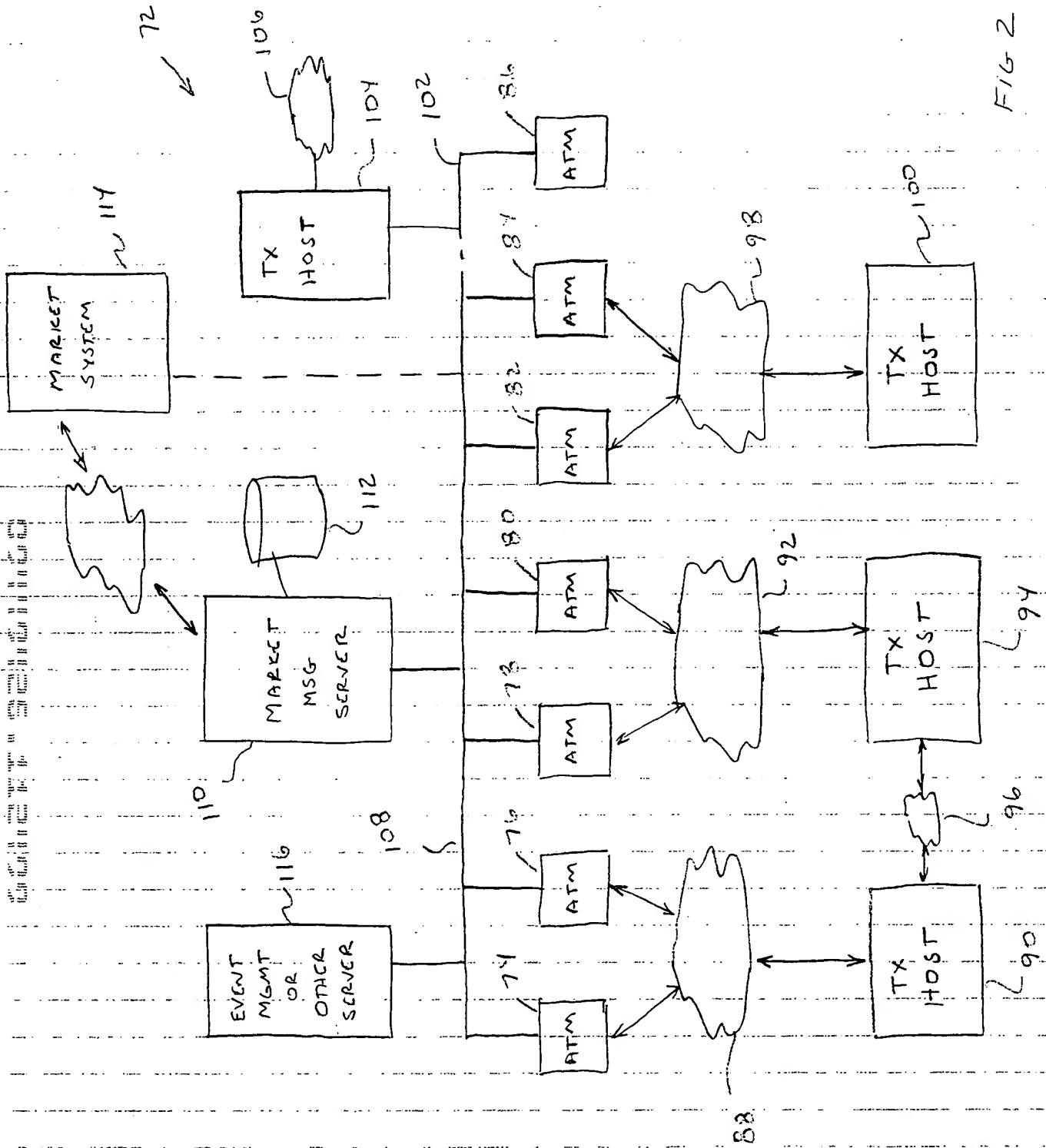   58   - PROMPT TAKE RECEIPT
                COMPLETION   54
- DEBIT ACCOUNT   ←—————————————
- STORE TXN DATA   56   - PROMPT ANOTHER TX ~62
        60   - IF YES (B) IF NO ~66
                                            - RETURN CARD ~68
                                   64   - PROMPT TAKE
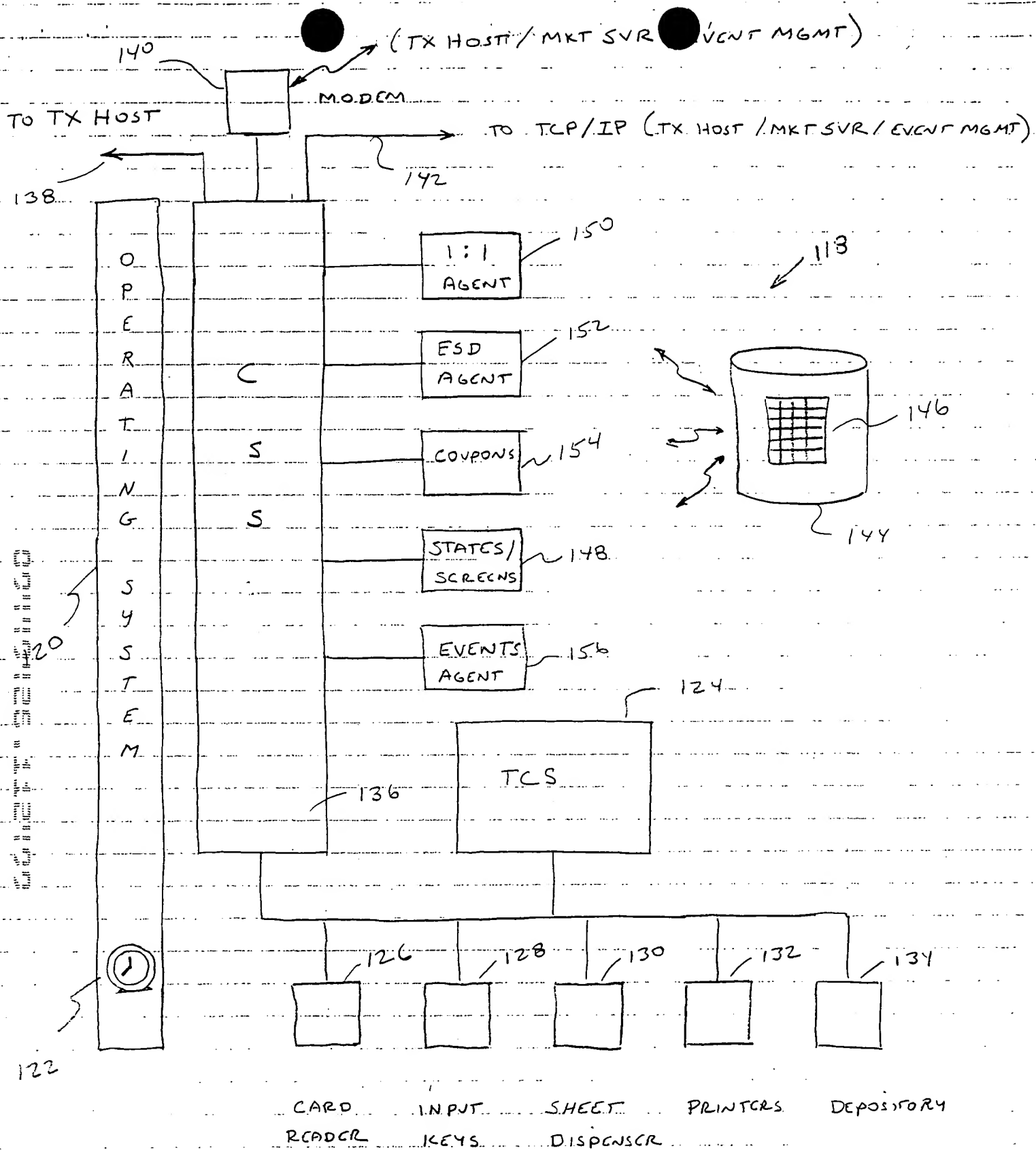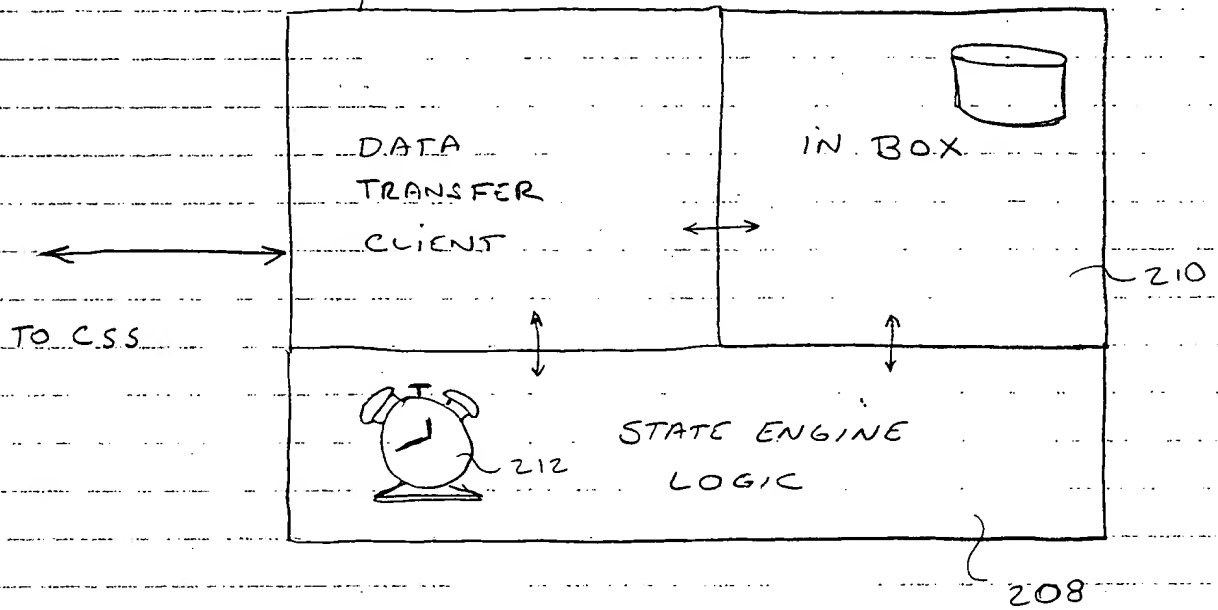   CARD (A) ~70

                    FIGURE 1
                    (PRIOR ART)

MARKET SYSTEM 114

TX HOST 106

104

102

ATM 86

ATM 84

ATM 82

TX HOST 100

98

MARKET MSG SERVER 110

112

ATM 80

ATM 78

TX HOST 94

92

96

EVENT MGMT OR OTHER SERVER 116

108

ATM 76

ATM 74

TX HOST 90

88

72

FIG 2

140

TO TX HOST

● (TX HOST / MKT SVR ● VENT MGMT)

MODEM

TO TCP/IP (TX HOST / MKT SVR / EVENT MGMT)

138

142

118

150 1:1 AGENT

152 ESD AGENT

154 COUPONS

146

148 STATES/ SCREENS

144

156 EVENTS AGENT

OPERATING SYSTEM

CSS

120

124 TCS

136

122

126 128 130 132 134

CARD READER

INPUT KEYS

SHEET DISPENSER

PRINTERS

DEPOSITORY

FIG 3.

200 — ESD AGENT

DATA TRANSFER CLIENT

IN BOX

210

TO CSS

212

STATE ENGINE LOGIC

208

152

FIG 4

Basic Architecture and Dataflow

Marketing DW/DM — 180

export
import

market to one: market message datasets — 173

external message format input/output specification table — 166

mpp mrkt_msg — 176

formatted request for message

mgr — 168

other MPPs — 174

market server: standalone or with iq@ESD — 170

ATM — 158

160

164

/* script */
idle
card inserted
get pan
send message
pin entry
receive market message
display market screen or default
transaction request
------ — 162

tcp/ip or other std io — 172

FIG 5

DATABASE COMPONENTS

iq**ESD**®

170

campaign - segment
coordination tables

166

→ distributed
to terminals

184

detailed records
1:1 market use

178

off-line

used in
iqMTO®
MARKET TO ONE
messaging

views of campaigns:
screen sequences

182

Campaigns,
Schedules,
- - - - - -
"artifacts"

168

One-to-One Market table
PAN, segment, screen viewed

FIG 6

Marketing Server

campaigns

relationship
marketing &
performance

170

market 1:1
message

campaign
distribution

internal data

158
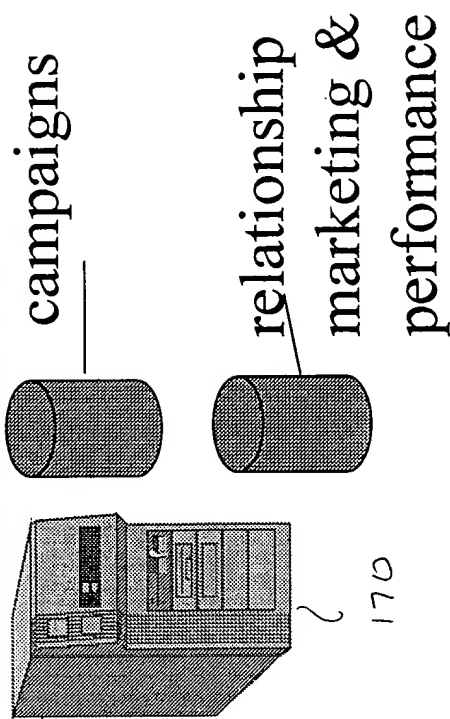
F I G 7

Marketing to One at the ATM

1   186

2   188

3   190

Messages sent to consumer based on business logic

4   192

172

170

iqESD with Marketing Message System

FIG 8

Fig 9

CHECKING ACCOUNT COMPARISON   194 ←

Visit #1	Visit #2	Visit #3		
Thank you for selecting Fourth Financial for your ATM transactions	Welcome back to Fourth Financial. We appreciate your ATM business.	We notice you using Fourth Financial ATMs frequently. Would you like information on how you can reduce ATM fees?		
			YES	Open a Fourth Financial checking account. We will refund all the ATM fees you paid to us in the last 30 days. Please enter your phone number and press the * key when done	● Thank you - we will call you in the next few days to open your account
			NO	Thank you for your business. Please call us at the number on the coupon if you change your mind	● Print coupon (may include information on potential savings)

FIG 10

Checking Overdraft Campaign

| Visit 1	Visit 2		Visit 3
(6) Thanks (name) for selecting 4th Financial for your checking business!	(8) (Name) You've been pre-approved for checking overdraft protection! We will protect your account in the event of an overdrawn check. . Would you like this protection activated?	**Y**	(9) Great! We'll mail your enrollment and information pack immediately. Thanks for your interest. -Print coupon #3	(17) (name). We have enrolled you in our overdraft protection program! Thank you!
		N	(10) You are a valued customer so if you reconsider simply call	(7) (name) Overdraft protection is still available. Call us if you change your mind at the number on the printed coupon (#3)

196

Skip Payment Campaign

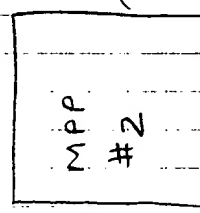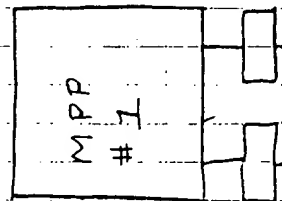| Visit 1	Visit 2		Visit 3
(11) Seasons Greetings from 4ᵗʰ Financial! (Name) Thank you for your recent credit card payment. We appreciate your excellent payment history!	(13) Seasons Greetings! We have a great holiday program just for you! We want to help you with those post holiday bills! (Name) Would you like to know more?	**Y**	(18) (Name) You are is now enrolled for the Holiday payment program. Enjoy your Holidays.
	(14) We appreciate your excellent payment history and would like to waive all late fees and minimum payments for January 1999. <u>Print</u> coupon #1		
	(15) Thank you for your excellent payment history. If there's anything we can do for you in the future, please call the 800-number listed on your receipt. <u>Print</u> coupon #1	**N**	(15) same

FIG 11

MARKET MESSAGE SERVER (ESD SERVER)

- FILES (MPEGS/ STATES - SCREENS/ GRAPHICS/ ICONS)
- TERMINALS (ATM LOCATIONS/ GROUPS)
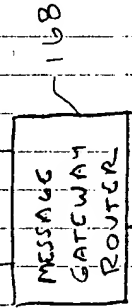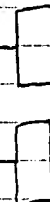- CAMPAIGNS (PRESENTATIONS/ COUPONS)
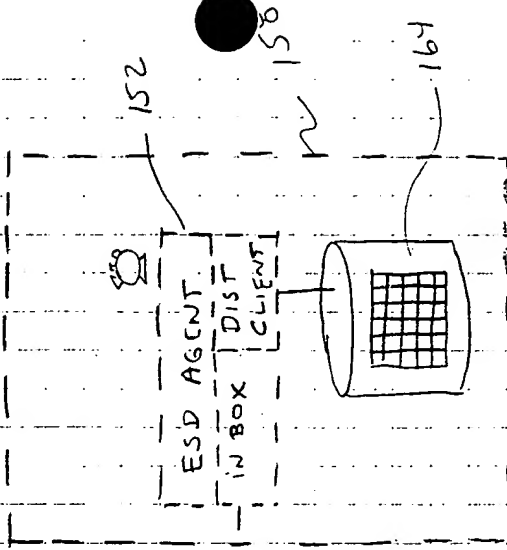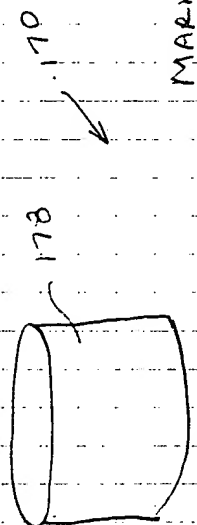- RESULTS/ ANALYSIS

170

166

ESD AGENT
IN BOX   DIST
              CLIENT

152

158
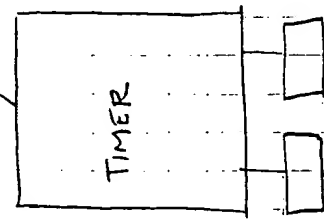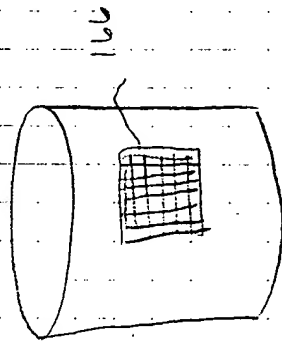
164
- FILES
- ACTIVATION LOGIC
- REPORT LOGIC

TIMER

202

MPP
#1

200

MPP
#2

174

172

168

MESSAGE
GATEWAY
ROUTER

DRIVER

204

ESD AGENT

FIG 12

MARKET MESSAGE SERVER
(1:1 SERVER)

- DETERMINE PROMOTION FROM PAN
- DOWNLOAD SCRIPT
- RECEIVE RESPONSES TO PROMPTS
- ANALYZE / EXPORT RESULTS

1:1 AGENT

150

159

158

170

172

168

MESSAGE GATEWAY ROUTER

FIG 13

178

176

MPP #4

214

MPP #3

224

TIMER

220

MGR

222

DRIVER

218

216

PLEASE INSERT

YOUR CARD

1234
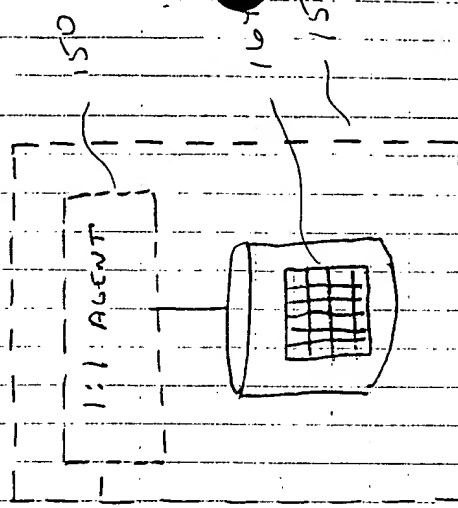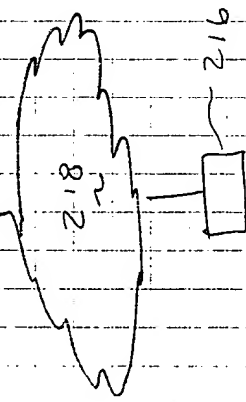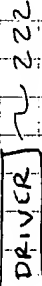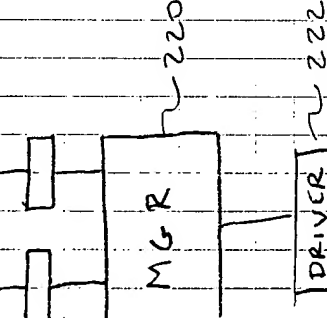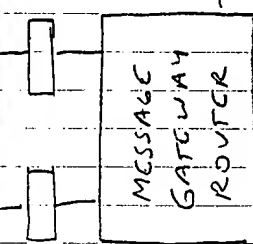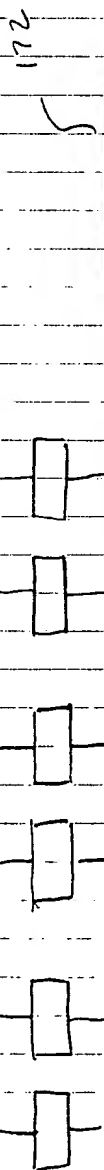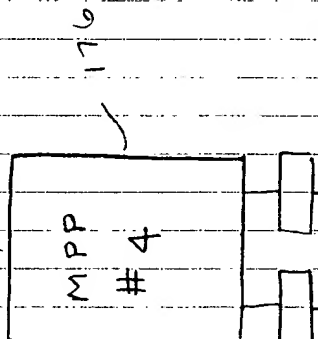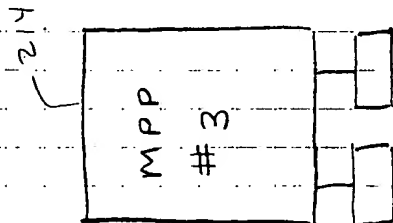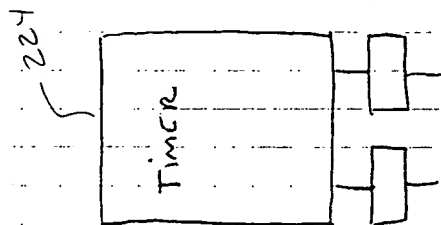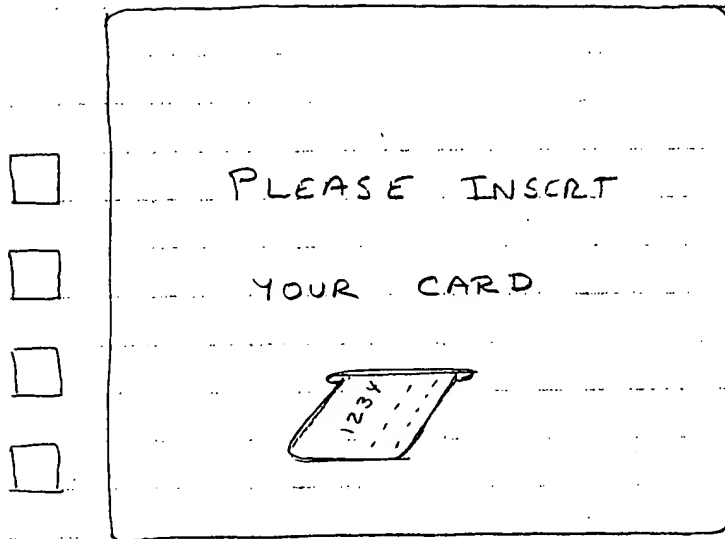
- CARD INSERTED
- PAN READ
- 1:1 AGENT
    SENDS PAN
- ESD AGENT
    ANALYZES BIN

FIG 14

226

PLEASE INPUT
YOUR PIN NUMBER

* * * * *

PRESS HERE
WHEN DONE - - - - - -
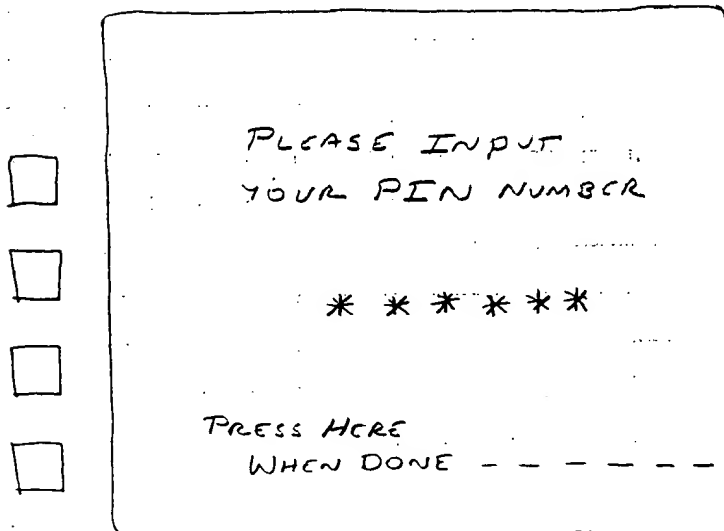
- 1:1 AGENT
    RECEIVES MSG
    FROM MKT SVR
- PIN READ

- 1:1 AGENT
    SENSES PIN
    COMPLETE INPUT

228

FIG 15

PLEASE SELECT YOUR
TRANSACTION

RECEIVE MONEY — — — —

DEPOSIT MONEY — — — —

BALANCE INQUIRY — — —

230

- 1:1 AGENT
  OPENS WINDOW
  OVERLYING NEXT
  USUAL TXN SCREEN
  OR LOCAL STATE/SCREEN
  FLOW EXECUTED

FIG 16

HELLO DON McCOY
FOURTH FINANCIAL VALUES
YOUR BUSINESS. YOU
ARE PRE APPROVED FOR THE
NO FEE FF VISA CARD
ARE YOU INTERESTED? YES — — —

— — — NO

232

- 1:1 AGENT
  RUNS/GENERATES
  PROMOTIONAL
  PROMPT MESSAGE

- IF NO RESPONSE
  AGENT WILL TIME
  OUT AND RETURN
  TO STANDARD
  TXN SCREEN

FIG 17

234

DO YOU NEED
MORE TIME?

YES – – – – – →

NO – – – – – →
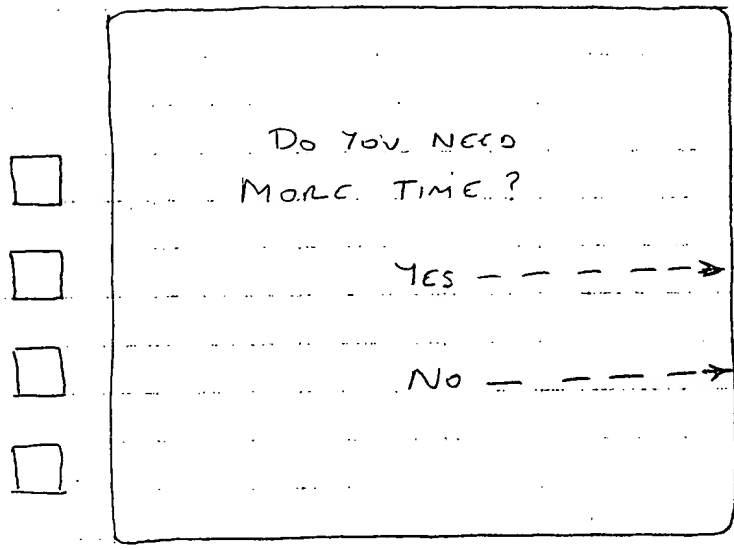
- TIME OUT SCREEN
  COMES UP IN BACKGROUND
  (NOT VISIBLE)
- 1:1 AGENT SENSES
  TIME OUT SCREEN
  GENERATES "YES"
  SIGNAL

- AGENT WINDOWS
  CONTINUE IN
  FOREGROUND

Fig 18

236

GREAT! WE WILL HAVE
SOMEONE CALL YOU TO
CONFIRM. PLEASE INPUT
YOUR DAYTIME PHONE NO.

330 – 490 – – – – –

PRESS HERE
TO START OVER

PRESS HERE
TO CONFIRM →
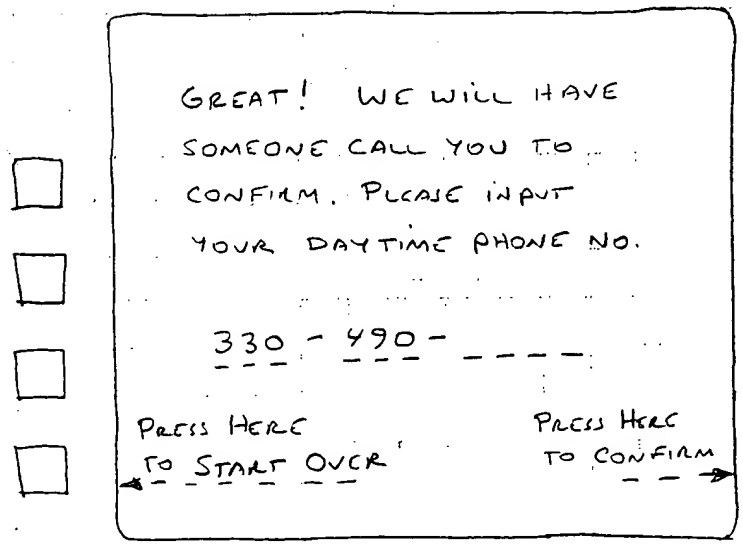
- IF THE USER
  INDICATES ACCEPTANCE
  THE OFFER
  THE AGENT RUNS/
  GENERATES INPUT
  SCREEN

- IF NO INPUT AGENT
  TIMES OUT

Fig 19

_238_

THANK YOU!

YOU ARE ALSO ENTERED
IN OUR SWEEPSTAKES
TO WIN AN ALL EXPENSES
PAID VACATION TO THE
BAHAMAS!

- 1:1 AGENT
  RUNS/GENERATES
  SCREEN

- AGENT SENDS
  MESSAGE TO
  MKT SVR

FIG 20

_240_

PLEASE SELECT YOUR
TRANSACTION

RECEIVE MONEY _ _ _ _ _ → ☒

DEPOSIT MONEY
        _ _ _ _ _ →

BALANCE INQUIRY _ _ _ _ _ →

- 1:1 CLOSES WINDOW
  OVERLYING NEXT
  TRANSACTION SCREEN
  OR MOVES TO NEXT
  STATE/SCREEN

- CUSTOMER CHOOSES
  TO RECEIVE MONEY

- 1:1 SENDS RESULTS
  MESSAGE TO MKT
  MSG SVR

FIG 21

PLEASE SELECT YOUR
ACCOUNT

CHECKING — — — — — — →
SAVINGS — — — — — — →
CREDIT CARD — — — — →

— NEXT STANDARD
SCREEN PROMPTS
ACCOUNT SELECTION

— CUSTOMER SELECTS
CHECKING ACCOUNT

← 242

FIG 22

PLEASE ENTER THE AMOUNT
YOU WISH TO RECEIVE

$100.00

PRESS HERE TO CONFIRM
— — — — →

PRESS HERE
TO CANCEL
← — — —

— CUSTOMER INPUTS
AMOUNT

— CUSTOMER CONFIRMS
AMOUNT

— REQUEST MSG
SENT TO HOST

— ESD AGENT
(AND/OR 1:1 AGENT)
SENSES CONFIRMATION
INPUT

← 244

FIG 23

~ 246

PLEASE WAIT

YOUR TRANSACTION
IS BEING PROCESSED

- NEXT TRANSACTION
  SCREEN IS GENERATED

- AGENT OPENS WINDOW
  OVERLYING "WAIT"
  SCREEN OR
  LOCAL STATE / SCREEN
  LOGIC EXECUTED

FIG 24.

~ 248

7 UP   THE UNCOLA

GET A COUPON GOOD
FOR ONE DOLLAR OFF
YOUR NEXT PURCHASE
OF A 2 LITER BOTTLE

No
THANKS

PRESS HERE
FOR COUPON

- ESD AGENT
  RUNS / GENERATES
  WINDOW OVERLYING
  TRANSACTION WINDOW
  OR EXECUTE LOCAL STATE/
  SCREEN

- OFFER ACCEPTED
  COUPON PROGRAM
  OPERATES PRINTER
  TO PRINT COUPON
  AN DISPENSE

- RECORD MADE
  AND STORED BY
  ESD AGENT

FIG 25

~250

ENJOY 7 UP

THE UNCOLA

PLEASE TAKE
YOUR COUPON

$1.00 OFF
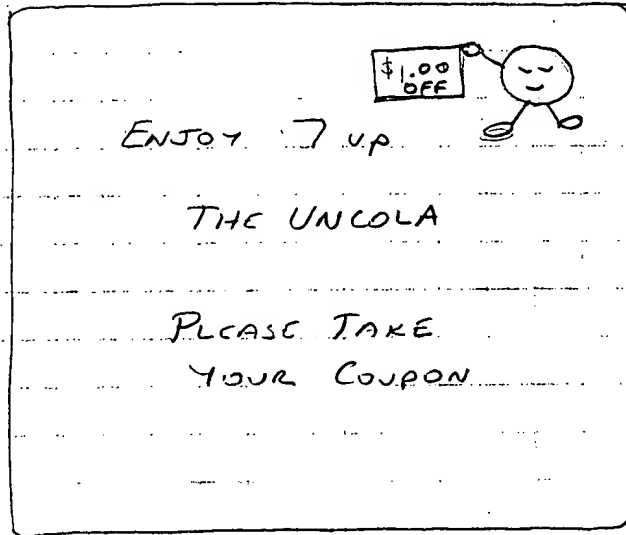
- ESD AGENT
  RUNS / GENERATES
  SCREEN

- ESD AGENT WINDOW
  OVERLIES TRANSACTION
  WINDOW OR EXECUTES
  LOCAL STATE / SCREEN
- RESPONSE MSG
  RECEIVED FROM HOST
  CASH BEING DISPENSED

FIG 26

~252

PLEASE TAKE
YOUR CASH

$
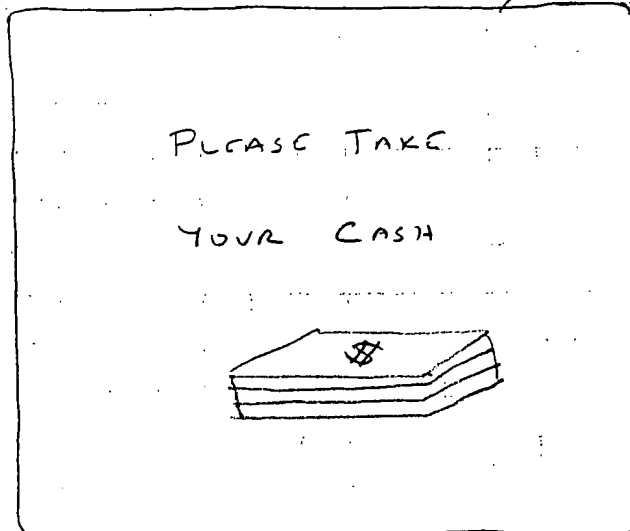
- ESD AGENT
  (OR 1:1 AGENT)
  CLOSES WINDOW
  OVERLYING NORMAL
  SCREEN OR LOCAL
  STATE / SCREEN LOGIC
- CUSTOMER TAKES
  CASH

- RECEIPT IS PRINTED

FIG 27

254

PLEASE TAKE
YOUR RECEIPT

- ATM SCREEN
PROMPTS CUSTOMER
TO TAKE RECEIPT

- COMPLETION MSG
SENT BY ATM
TO HOST

FIG 28

256

WOULD YOU LIKE
ANOTHER TRANSACTION ?

YES - - - - →

- - - - - - NO

- ATM SCREEN PROMPTS
CUSTOMER CONCERNING
ANOTHER TRANSACTION

- CUSTOMER DECLINES

- ESD AGENT SENSES
END TXN INPUT

FIG 29

_258_

ENJOY YOUR

7 UP

COME BACK
AGAIN
SOON
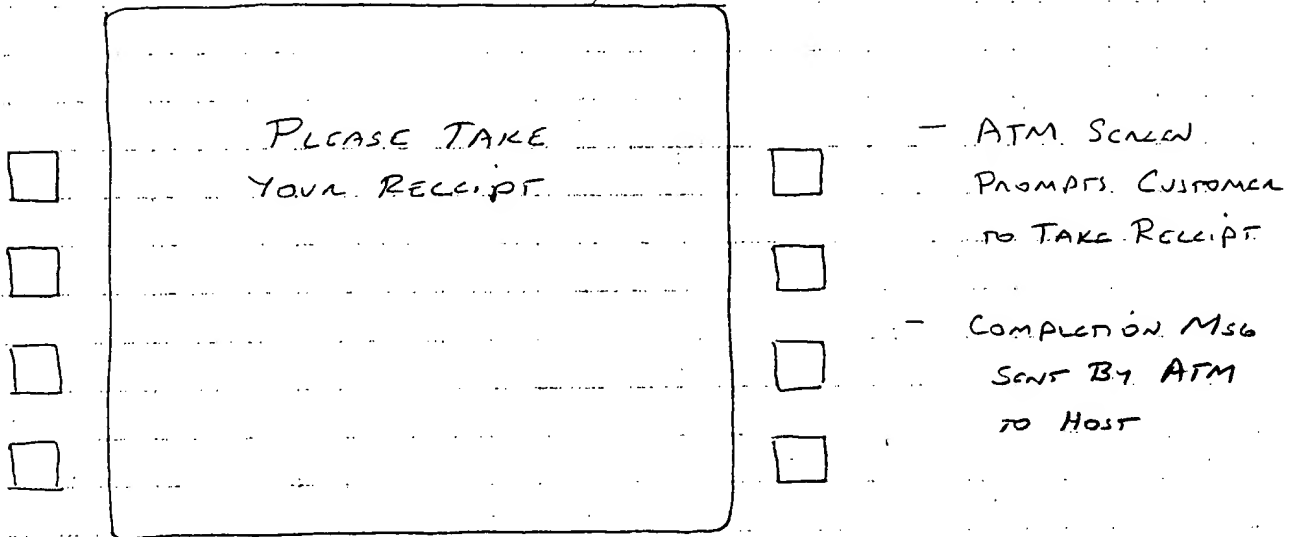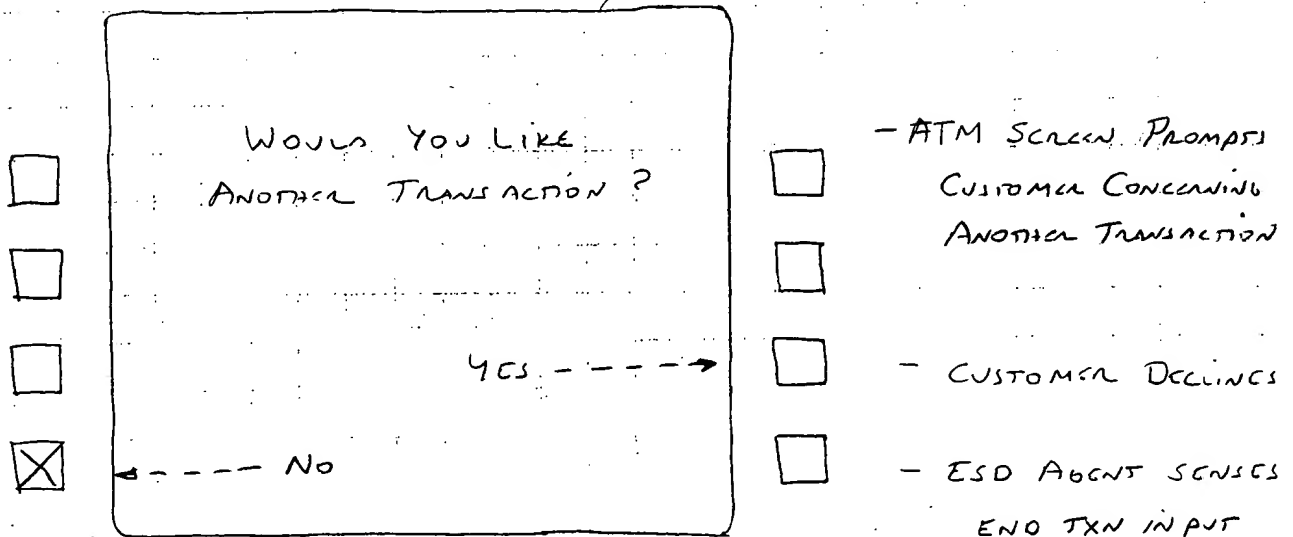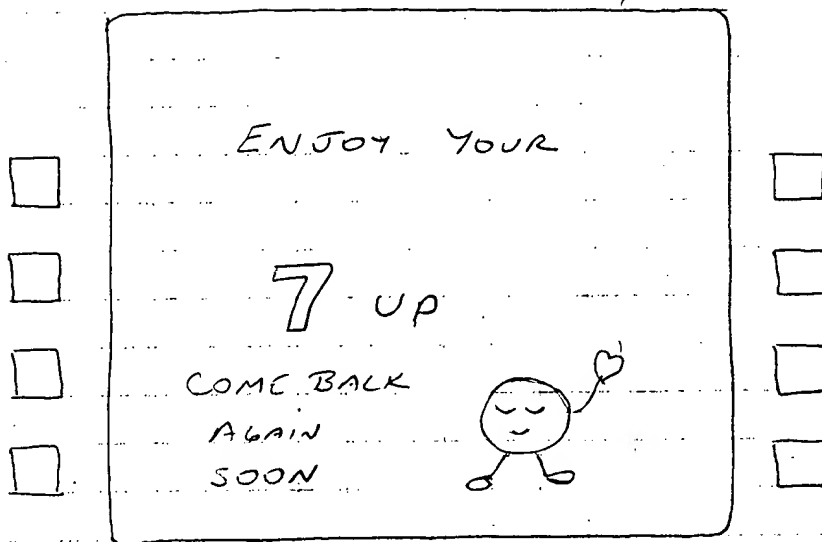
FIG 30

- ESD AGENT
  (OR 1:1 AGENT)
  RUNS / GENERATES
  SCREEN IN WINDOW
  OVERLYING TXN
  SCREEN OR LOCAL
  STATE / SCREEN

- ADDITIONAL
    SCREENS OR
    WINDOWS
    CAN BE RUN
    IN ATTRACT
    MODE

_262_

THE HOLIDAYS ARE
JUST AROUND THE CORNER
BE SURE TO HAVE ENOUGH

7 UP

PLEASE TAKE
YOUR CARD

_260_
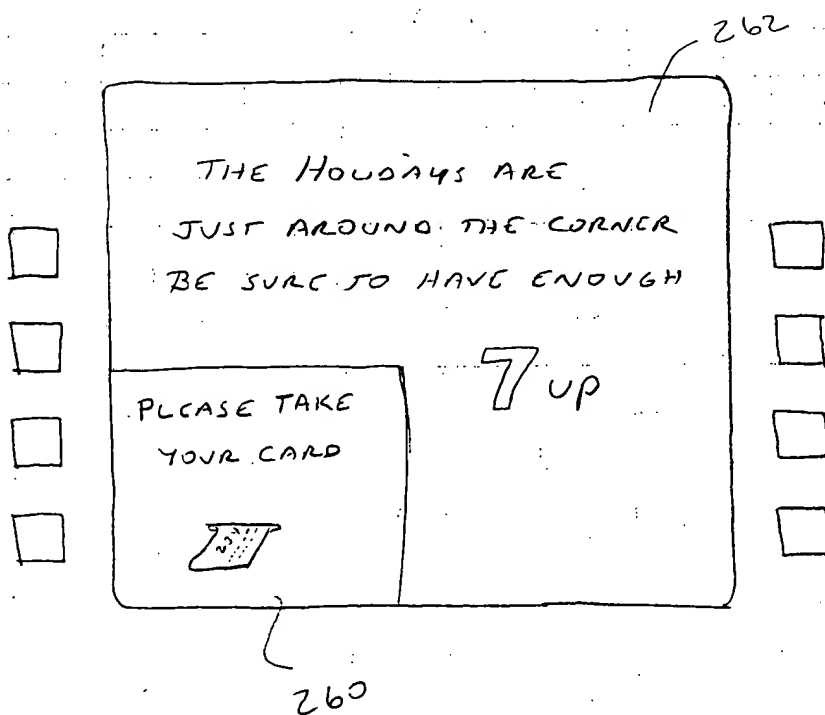
FIG 31

- ESD AGENT
    OPENS WINDOW
    IN BACKGROUND
    WITH TXN SCREEN
    IN FOREGROUND

- CAN RUN
    MPEGS
    ICONS
    GRAPHICS
    SCREENS

Screen Hierarchy

Schedule Snapshot Rollback 414

Schedule File Retrieval 417

Snapshot Rollback File Retrieval 412

View Campaign 400

Access Management 406

Edit Users 408

Report Generation 410

Report

Campaign History 398

Waste Basket 397

Import Select

Password Verification 264

Main Screen 266

Campaign Scheduling 390

Schedule 392

Confirmation 394

VIEW 396

File Open

SST History 402

SST Management 292

Package Creation 346

Type Selection 350

Build Features (Add Content)

386

382

376

374

Notepad

File View 404

Distribution List 336

Name Group List 348

Group Properties 340

View List of SSTs 344

SST History VIEW

Name 338

Add/Edit Group 342

Define Features

327
326

Configuration List 306

SST Add/Edit 300

Location List 330

Location Add/Edit 328

Merchant List 332

Merchant Add/Edit.

322
318
316

314

NAME 310

320

334

iqESD Graphical Interface

F_{IG} 32

Main Screen.

Fig 33

Distribution List

Distribution List

Name	Description	SSTs in List
BP	SST in BP Gas Station	4
McDonald	SST in Mcdonald's	53
Mall	SST in Mall	3
SST in Lab	Lab Testing	1
SST in Lab 2	Lab Testing	1
sample	sample1	0
JBM terminals	These are my terminals	0
dog1	Just a dog	1
sdlgsdfg		1
new group		87
The dog	the dog	1
The new dog	The new dog	1
lpon	lpon	1

Add...   Edit...   Delete

Help

Close

336

Fig 34

338

Distribution List Name Selection

Name:

Description:

OK   Cancel   Help

FIG 35

Distribution Group Properties

Group Name: SST in Lab

Include Selection

(111)

[Add...] [Edit...] [Delete...]

Exclude Selection

[Add...] [Edit...] [Delete...]

SST Count based upon selection criteria: 1   [View Selected List...]

[Close] [Help...]

/340

FIG 36

Distribution Property Selection

Self Service Terminal (SST) Location

☑ SST Location Used

Self Service Terminal (SST) ID

| <None> ▼ | |

Address

| <None> ▼ |
| <None> ▼ |

City

| AKRON ▼ |

State

| OH ▼ |

Postal Code (ZIP Code)

| <None> ▼ |

Merchant Name

| <None> ▼ |

SST Features

☐ Coupon Application - Rules   ☐ Local Screen Loading

☐ Coupon Application - Selection from Screen   ☐ Local State Loading

☐ Movie Player   ☐ Screen Graphics Display

SST Custom Keywords

| <None> ▼ | <None> ▼ |
| <None> ▼ | <None> ▼ |

| OK | Cancel | Help |

342

FIG 37

Selected SSTs ☒

Group Name: | Mall

Name	Terminal ID	Location	Merchant	
	126	Wendy's	WENDY'S	
	127	Wendy's	WENDY'S	
	128	Wendy's	WENDY'S	

Close   Help

~344

FIG. 38

Campaign Creation

Current Campaigns:

Name	Description	Marketing Group	Current Status	Owner
campaign a		McDonald (53)	Delivery not Scheduled	ABBRUZT
Campaign B		McDonald (53)	Delivery Canceled	ABBRUZT
Coke		BP (4)	Delivery Canceled	KiddingRU
Coke		BP (4)	Delivery Canceled	KiddingRU
JBM Campaign	Movie for BP stations	JBM terminals (0)	Delivery not Scheduled	meekj
JBMII	This is my second ...	JBM terminals (0)	Delivery not Scheduled	meekj
jbmsample2		BP (4)	Delivery not Scheduled	meekj
Judo	Judo	Ipon (1)	Delivery not Scheduled	hearde
name		BP (4)	Delivery not Scheduled	hearde
name		BP (4)	Delivery not Scheduled	hearde
name		BP (4)	Delivery not Scheduled	hearde
name11		BP (4)	Delivery not Scheduled	hearde
open	,	BP (4)	Delivery not Scheduled	hearde
sample package		BP (4)	Delivery not Scheduled	meekj
TCA1		Mall (3)	Delivery not Scheduled	ABBRUZT
The Dog's Cam...	The Dog's Campaign	dog1 (1)	Delivery not Scheduled	KiddingRU
the dog's camp...	the dog's campaign	The new dog (1)	Delivery not Scheduled	hearde
The new dog	The new dog	BP (4)	Delivery not Scheduled	hearde
The new dog's ...	The new dog's ca...	BP (4)	Delivery not Scheduled	hearde
this is the name	This is the descrip	BP (4)	Delivery not Scheduled	KiddingRU

Add...   Edit...   Send to Wastebasket

Help   Edit Wastebasket...

Close

Fig 39

346

Campaign Creation Selection ⊠

1. Enter the name of this package in the following fields. This name should be descriptive as it will be used to identify the package.

Campaign Name to Create:	
Description:	

2. Select a Distribution List. This is the group of SSTs that will receive the package that is named above.

Currently Defined Distribution Lists

Name	Description	Number of SSTs in List
BP	SST in BP Gas Station	4
McDonald	SST in Mcdonald's	53
Mall	SST in Mall	3
SST in Lab	Lab Testing	1
SST in Lab 2	Lab Testing	1
sample	sample1	0
JBM terminals	These are my terminals	0
dog1	Just a dog	1
sdfgsdfg		1
new group		87
The dog	the dog	1
The new dog	The new dog	1
Ipon	Ipon	1

348

Create New Distribution List

OK	Cancel	Help

FIG 40

Create Marketing Package ☒

Current Package

Name: Campaign B

Description: [ ]

Select Feature Type

| 352 → | Rules Based Coupons... | Selection of a Coupon Configuration file and printable coupon files to be sent to the Self Service Terminals for use with XApCoupon Plus. |

| 354 → | Coupon Selection... | Selection of printable coupon files and associated screen graphics to be sent to the Self Service Terminal for use with the Coupon Selection State. |

| 356 → | Graphics... | Selection of screen graphics to be sent to the Self Service Terminal. (GIF, PCX, DDU) |

| 358 → | Video... | Selection of video files to be sent to the Self Service Terminal. (MPEGs, FLC, FLI) |

| 360 → | Local State File... | Selection of a local state file to be sent to the Self Service Terminals for use with LSC. |

| 362 → | Local Screen File... | Selection of a local screen file to be sent to the Self Service Terminals for use with LSC. |

350

Close   Help

FIG 41

Rules Based Coupon Feature ☒

Package Name: Campaign B

Description:

Select Feature to Edit

Name	Filename	Description	Original Path
Coupon Application		Coupon App version 1.2	

[Edit] [Remove Filename]

[Close] [Help]

~364

FIG 42

Rules Based Coupon Feature

Coupon Rule File:

[▼]

[2. Browse...]

Available PCX Coupon Files:

```
COKE.PCX
LAYS.PCX
x98rsc.pcx
```

[Add >>]

Selected PCX Coupon Files:

[Browse...]

[Remove Image]

[OK] [Cancel] [Help]

366

FIG 43

Coupon and Icon Selection

Select Feature to Edit

Name	Description
dons test	test

Package Name: key test

Description: test

- ○ Consumer Display Graphics
- ● 'Down' Touch Button Graphics (Optional)
- ○ Coupons to be Printed
- ● Function Key Settings

Coupon List

COKE.PCX
LAYS.PCX
x9llrsc.pcx

Browse... View...

Graphics List:

- ○ PCX Type Images
- ○ GIF Type Images
- ○ DDU Type Images

ANIM.GIF
bart.gif
ban2.gif
BEAN.GIF
BEANBACK.GIF
BESTWITH.GIF
BIKE.GIF

Browse... View...

Close | Help

art | Exceed | Diebold tgESD | Microsoft Word - screenph...

368

FIG 44

Coupon and Icon Selection

Select Feature to Edit

Name	Description
dons test	test

Package Name: | key test
Description: | test

- ○ Consumer Display Graphics
- ○ 'Down' Touch Button Graphics (Optional)
- ○ Coupons to be Printed
- ● Function Key Settings

Button A
- Enable Button
- Exit Button

Button B
- Enable Button
- Exit Button

Button C
- Enable Button
- Exit Button

Button D
- Enable Button
- Exit Button

Button F
- Enable Button
- Exit Button

Button G
- Enable Button
- Exit Button

Button H
- Enable Button
- Exit Button

Button I
- Enable Button
- Exit Button

Coupon List
COKE.PCX
LAYS.PCX
x9ltrsc.pcx

Browse... | View...

Graphics List
- ○ PCX Type Images
- ○ GIF Type Images
- ○ DDU Type Images

COKE.PCX
LAYS.PCX
x9ltrsc.pcx

Browse... | View...

Close | Help

370

Fig 45

View ✕

Enjoy a Coke

Any Coca-Cola Product
For just 59 cents
When purchased
with this
coupon

Valid this date only: 10/12/97

Copy Picture to Clipboard

Magnify

☐ Magnify Picture

Click mouse button on image to magnify.

Aspect Ratio

⦿ Largest Possible View
◯ Correct Aspect Ratio

Filename: c:\iqesd\repository\lib\icons\COKE.PCX

[Close] [Help]

~372

FIG 46

Graphic Feature ✕

Name: key test

Description: test

Select Feature to Edit

Name	Filename
dons graphic	12345678901234567O9...
asdfsdf	

Available Images

View

- ○ PCX Type Images
- ○ GIF Type Images
- ○ DDU Type Images

COKE.PCX
LAYS.PCX
x98rsc.pcx

Current Graphic Name: 123456789012345678901234567.pcx

Browse Add >>

Remove Graphic

Close Help

~374

FIG 47

Video Feature ✕

Package Name: key test

Description: test

Select Feature to Edit

Name	Filename
test	
another mo...	
test again	

Available Movies

Badday.mpg
BIKE.mpg
CAR.mpg
Dbold1.mpg

Browse Add >>

View

Multiple Movie

- ○ First
- ○ Second
- ○ Third

Movie Type Selected:

MPEG Movie

Selected Movie: Text1

Play Pause Stop Remove

Close Help

~376

FIG 48

View ✕

```
        ┌────────────────────────────────────┐
        │  00:00      00:00                   │
        │             TIME                    │
        └────────────────────────────────────┘
```

▶❙ ◼   ⎰ 380

☐ Play Movie Full Screen

Filename   c:\iqesd\repository\lib\icons\Badday.mpg

Close   Help

FIG 49

State File Feature　　　　　　　　　　　　　　　　　　　　　　　　　☒

Package Name: Coke

Description:

Select Feature to Edit

Name	Filename	Description	Original Path
Check Processing		States for check deposits	

Edit　　　　　　Remove Filename

Close　　　Help

_382_

FIG 50

State File Feature　　　　　　　　　　　　　　　　　　　　　　　　　☒

State File

Browse...

OK　　　　Cancel　　　Help

_384_

FIG 51

Screen File Feature ✕

Package Name: Coke

Description:

Select Feature to Edit

Name	Filename	Description	Original Path
Check Processing		Screens for check deposits	

Edit...   Remove Filename

Close   Help

~ 386

FIG 52

Screen File Feature ✕

Screen File:

Browse

OK   Cancel   Help

~ 388

FIG 53

Wastebasket ✕

Name	Type	Description	User Name
JBM sample package	Campaign	zzzmy sample p...	meekj
name	Campaign		hearde
Trisha's Campaign	Campaign	sample	ABBRUZT
Training Campaign	Campaign		ABBRUZT
JBM2 sample package 2	Campaign	This is my 2nd s...	meekj
Coke	Campaign		KiddingRU
Coke	Campaign		KiddingRU
Snapshot 1998/10/13 14:48...	Snapshot	My Snapshot JBM	meekj
Rollback 1998/10/13 15:02...	Retrieval	File Retrieval- m...	meekj

◀ ▶   ~347

Return Package to List	Export	Import

Close	Help

FIG 54

Campaign Management

Current Campaigns:

Name	Description	Current Status
campaign a		Delivery not Scheduled
Campaign B		Delivery not Scheduled
Coke		Delivery not Scheduled
Coupon Selection State		Delivery Canceled
JBM Campaign	Movie for BP stations	Delivery not Scheduled
JBMII	This is my second sample pkg	Delivery not Scheduled
jbmsample2		Delivery not Scheduled
Judo	Judo	Delivery not Scheduled
name		Delivery not Scheduled
name		Delivery not Scheduled
name		Delivery not Scheduled
name11		Delivery not Scheduled
open		Delivery not Scheduled
Retrieval 1998/10/19 16:15:11	DonTest1111	Delivery Canceled
Retrieval 1998/10/19 18:04:41	File Retrieval	Delivery Canceled
Rollback 1998/10/13 14:58:28	Rollback	Delivery Canceled
Rollback 1998/10/13 15:19:59	File Retrieval	Delivery Canceled
Rollback 1998/10/15 14:38:43	File Retrieval	Delivery Canceled

View
- ○ Show all campaigns
- ○ Show only scheduled campaigns
- ◉ Show only unscheduled campaigns

Schedule Campaign...

Cancel Campaign Delivery

Close   Help

390

FIG 55

Campaign Schedule

Delivery Time

○ Deliver As Soon As Possible
○ Specify Time to Deliver
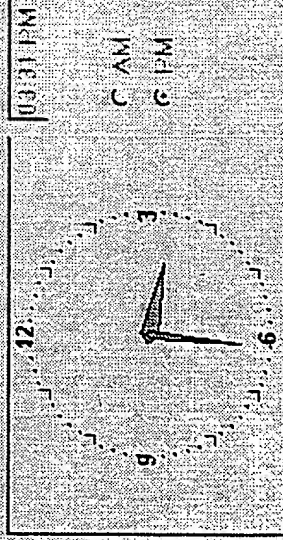
November 1998

Sun	Mon	Tue	Wed	Thu	Fri	Sat
25	26	27	28	29	30	31
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	1	2	3	4	5

November ▼ 1998 ▼   Set to Today

03:31 PM

○ AM
○ PM

Activation Time

○ Activate As Soon As Possible
○ Specify Time to Activate

Time
○ Local time of Self Service Terminal (SST)
○ Time of Server
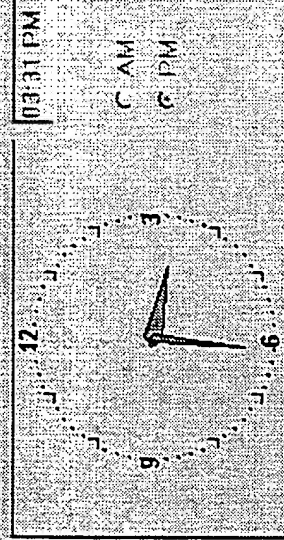
November 1998

Sun	Mon	Tue	Wed	Thu	Fri	Sat
25	26	27	28	29	30	31
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	1	2	3	4	5

November ▼ 1998 ▼   Set to Today

03:31 PM

○ AM
○ PM

Schedule Package Now   Cancel   Help

392

Fig 56

Schedule Confirmation ⊠

What package is being delivered

Package Name: campaign a -

Where the package is going

Number of SSTs in list: 53

SST Group Name: McDonald - SST in Mcdonald's

View SST List...

Current Time and Date: 11/11/98 3:31:33 PM

When the package is going to be delivered

Delivery Date and Time: As Soon As Possible

Delivery will occur in: Based upon server activities

Activation Date and Time: As Soon As Possible

Activation will occur in: Based upon server activities

~ 394

Confirmation OK | Cancel | Help

FIG 57

Selected SSTs

Group Name: McDonald - SST in Mcdonald's

Name	Terminal ID	Location	Merchant	
	229	McDonald's	MCDONALD'S	
	230	McDonald's	MCDONALD'S	
	231	McDonald's	MCDONALD'S	
	232	McDonald's	MCDONALD'S	
	233	McDonald's	MCDONALD'S	
	234	McDonald's	MCDONALD'S	
	235	McDonald's	MCDONALD'S	
	236	McDonald's	MCDONALD'S	
	237	McDonald's	MCDONALD'S	
	238	McDonald's	MCDONALD'S	
	239	McDonald's	MCDONALD'S	
	240	McDonald's	MCDONALD'S	
	241	McDonald's	MCDONALD'S	
	242	McDonald's	MCDONALD'S	
	243	McDonald's	MCDONALD'S	
	244	McDonald's	MCDONALD'S	
	245	McDonald's	MCDONALD'S	
	246	McDonald's	MCDONALD'S	
	247	McDonald's	MCDONALD'S	
	248	McDonald's	MCDONALD'S	
	249	McDonald's	MCDONALD'S	
	250	McDonald's	MCDONALD'S	
	251	McDonald's	MCDONALD'S	
	121	McDonald's	MCDONALD'S	

Close   Help

~396

FIG 58

Retrieval/Snapshot/Rollback

Name	Scheduled Delivery	Discription	Distribution List	Status
Retrieval 1998/11/04 ...	As Soon As Poss...	File Retrieval	new dist list	Delivery Schedule
Retrieval 1998/11/04 ...	As Soon As Poss...	File Retrieval	Dons Test	Delivery Schedule
Retrieval 1998/11/04 ...	As Soon As Poss...	File Retrieval	new dist list	Delivery Schedule
Rollback 1998/11/04 0...	11/01/98 12:00 AM	Rollback	Dons Test	Delivery Schedule
Snapshot 1998/11/04 ...	11/01/98 12:00 AM	Snapshot	movieChannel...	Delivery Schedule

~ 412

Add

File Retrieval

Snapshot

Rollback

Edit

Edit

View

Cancel Delivery

Wastebasket

Send to Wastebasket

Edit Wastebasket

Close   Help

FIG 59

Schedule Time - Define Snapshot

Distribution List

Name	Description	SST's in List
BP	SST in BP Gas Station	4
dog1	Just a dog	1
Ipon	Ipon	1
JBM terminals	These are my terminals	0
Mall	SST in Mall	3
McDonald	SST in Mcdonald's	53
new group		87
sample	sample1	0

Create New Distribution List...

November 1998

Set to Today   November ▼   1998 ▼

Sun	Mon	Tue	Wed	Thu	Fri	Sat
25	26	27	28	29	30	31
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	1	2	3	4	5

Delivery Time

- ○ Deliver As Soon As Possible
- ○ Specify Time to Deliver

12:00 Midnight

○ AM
○ PM

Description: Snapshot

Schedule   Cancel   Help

~414

FIG 60

Schedule Time - Define Rollback

Distribution List

Create New Distribution List...

Name	Description	SST's in List
BP	SST in BP Gas Station	4
dog1	Just a dog	1
Ipon	Ipon	1
JBM terminals	These are my terminals	0
Mall	SST in Mall	3
McDonald	SST in Mcdonald's	53
new group		87
sample	sample1	0

Delivery Time

⊙ Deliver As Soon As Possible

○ Specify Time to Deliver

12:00 Midnight

⊙ AM
○ PM
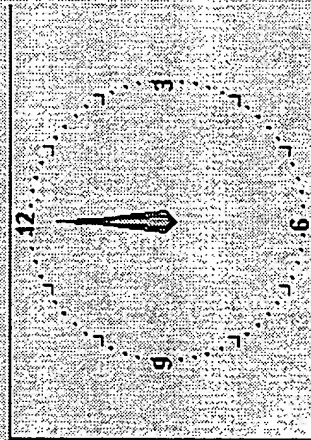
November 1998

Set to Today

November ▾   1998 ▾

Sun	Mon	Tue	Wed	Thu	Fri	Sat
25	26	27	28	29	30	31
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	1	2	3	4	5

Description:

Rollback

| Schedule | Cancel | Help |

File Retrieval

Distribution List:

Create New Distribution List...

Name	Description	SSTs in List
BP	SST in BP Gas Station	4
dog1	Just a dog	1
Ipon	Ipon	1
JBM terminals	These are my terminals	0
Mall	SST in Mall	3
McDonald	SST in Mcdonald's	53
new group		87
sample	sample1	0
sdlgsdfg		1
SST in Lab	Lab Testing	1
SST in Lab 2	Lab Testing	1
The dog	the dog	1

Retrieval Type

- Agent Activation Log
- Agent Activity Log
- Coupon Rule Counter
- Coupon Select Counter
- Dial-up Activity Log
- EDC Files
- MPEG Metrics

Set to Today

November 1998

November ▼   1998 ▼

Sun	Mon	Tue	Wed	Thu	Fri	Sat
25	26	27	28	29	30	31
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	1	2	3	4	5

Delivery Time

12:00 Midnight

○ AM
○ PM

○ Deliver As Soon As Possible
○ Specify Time to Deliver

12
3
6
9

Description:

File Retrieval

Schedule | Cancel | Help

Microsoft Word - screenpi... | FreeCell Game #24767 | Diebold iqESD

417

FIG 62

History

Name	Status	Scheduled Delivery	Last Delivery	Scheduled Activati...	User Nan...
asdf	Delivery Sch...	As Soon As Possible	Not Delivered	As Soon As Possible	meekj
campaign a	Delivery Sch...	As Soon As Possible	Not Delivered	As Soon As Possible	ABBRUZ‾
Campaign B	Delivery not S...	As Soon As Possible	Not Delivered	As Soon As Possible	ABBRUZ‾
Coke	Delivery not S...	As Soon As Possible	Not Delivered	As Soon As Possible	KiddingRI
Coke	Delivery Sch...	10/25/98 01:56 PM	Not Delivered	10/23/98 01:56 PM	KiddingRI
Coupon Select...	Delivery Canc...	09/17/98 04:28 PM	Not Delivered	09/27/98 04:28 PM	KiddingRI
Fred	Delivery Succ...	09/18/98 12:04 PM	09/21/98 03:04 PM	09/30/98 12:16 PM	meekj
jbm	Delivery Canc...	10/31/98 09:18 AM	Not Delivered	10/31/98 09:18 AM	meekj
jbm	Delivery Sch...	10/30/98 03:00 AM	09/21/98 06:04 PM	10/30/98 12:15 AM	meekj
JBM Campaign	Delivery not S...	09/18/98 12:04 PM	Not Delivered	09/30/98 12:16 PM	meekj
JBMII	Delivery not S...	10/17/98 12:00 AM	Not Delivered	10/24/98 12:00 AM	meekj
jbmsample2	Delivery not S...	10/30/98 02:00 AM	Not Delivered	11/01/98 12:00 AM	meekj
Judo	Delivery not S...	As Soon As Possible	Not Delivered	As Soon As Possible	hearde
name	Delivery not S...	Not Scheduled	Not Delivered	Not Scheduled	hearde
name	Delivery not S...	Not Scheduled	Not Delivered	Not Scheduled	hearde
name	Delivery not S...	Not Scheduled	Not Delivered	Not Scheduled	hearde
name11	Delivery not S...	Not Scheduled	Not Delivered	Not Scheduled	hearde
open	Delivery not S...	As Soon As Possible	Not Delivered	10/06/98 12:00 AM	hearde
Retrieval 1998/...	Delivery Canc...	11/01/98 06:24 AM	Not Delivered	As Soon As Possible	KiddingRI
Retrieval 1998/...	Delivery Canc...	11/01/98 08:30 PM	Not Delivered	As Soon As Possible	KiddingRI
Retrieval 1998/...	Delivery Sch...	As Soon As Possible	Not Delivered	As Soon As Possible	ABBRUZ‾
Retrieve Counter	Delivery Sch...	09/27/98 04:28 PM	Not Delivered	10/07/98 04:28 PM	KiddingRI

[Cancel Campaign Delivery]   [View]   [Send to Wastebasket]   ~398

[Resend Failed...]   [Refresh List]   [Edit Wastebasket...]

[Close]   [Help]

F1G 63

View History

Package: 55 - 55
  Package Type: Campaign . Campaign Package
    Schedule
      Delivery
        Scheduled Delivery: As Soon As Possible
      Activation
        Scheduled Activation: As Soon As Possible
      Status
        Delivery not Scheduled
  Distribution
    Delivery Not Scheduled
      2 - jbm two

Package Identification

ID:

Name:

Description:

Address:

City:

State: Postal Code:

Package Contents

~ 400

Close   Help

FIG 64

SST History

Terminal ID	Name	Address	City	State	ZIP Code	Merchant
249		5454 MARKET ST	San Franci...	CA	95116	MCDONALD'S
250		5454 MARKET ST	San Franci...	CA	95116	MCDONALD'S
251		5454 MARKET ST	San Franci...	CA	95116	MCDONALD'S
107	-	Location5a1	Location5c	OH	5	Merchant Example
110	-	4840 SINCLAIR RD	Columbus	OH	43229	BP GAS STATION
113	-	Location5a1	Location5c	OH	5	Merchant Example
121	-	14615 PEARL RD	Cleveland	OH	44126	MCDONALD'S
123	-	2000 BRITTAIN Rd	Akron	OH	44310	Engineering System De...
252	-	14615 PEARL RD	Cleveland	OH	44126	MCDONALD'S
lpon	lpon	0000 Location Street	Locationville	ZZ	99999	DeBartolo Group
ABC123	JBM terminal	1126 E TALLMADGE ...	Akron	OH	44310	WENDY'S
4321	JBMSST	0000 Location Street	Locationville	ZZ	99999	DeBartolo Group
RACK 22	SQA Test Ra...	5995 Mayfair rd.	North Canton	OH	44720	Engineering System De...
104	Terminal 104	1126 E TALLMADGE ...	Akron	OH	44310	WENDY'S
320	test	516 W PERKINS AVE	Sandusky	OH	44870	SHELL GAS STATION
324	test2	1126 E TALLMADGE ...	Akron	OH	44310	WENDY'S
323	test3	516 W PERKINS AVE	Sandusky	OH	44870	SHELL GAS STATION
Tony1	Tony1	Location5a1	Location5c	OH	5	Merchant Example
54223	zfdffdhdfh	0000 Location Street	Locationville	ZZ	99999	DeBartolo Group
101	zqfhgfh	Location5a1	Location5c	OH	5	Merchant Example

~ 402

☑ Update SST Details

Last Snapshot:	8/18/98 4:28:37 PM	Unsuccessful
Last Rollback:	8/19/98 4:28:37 PM	Unsuccessful
Last File Retrieval:		Not Retrieved

View Distribution History

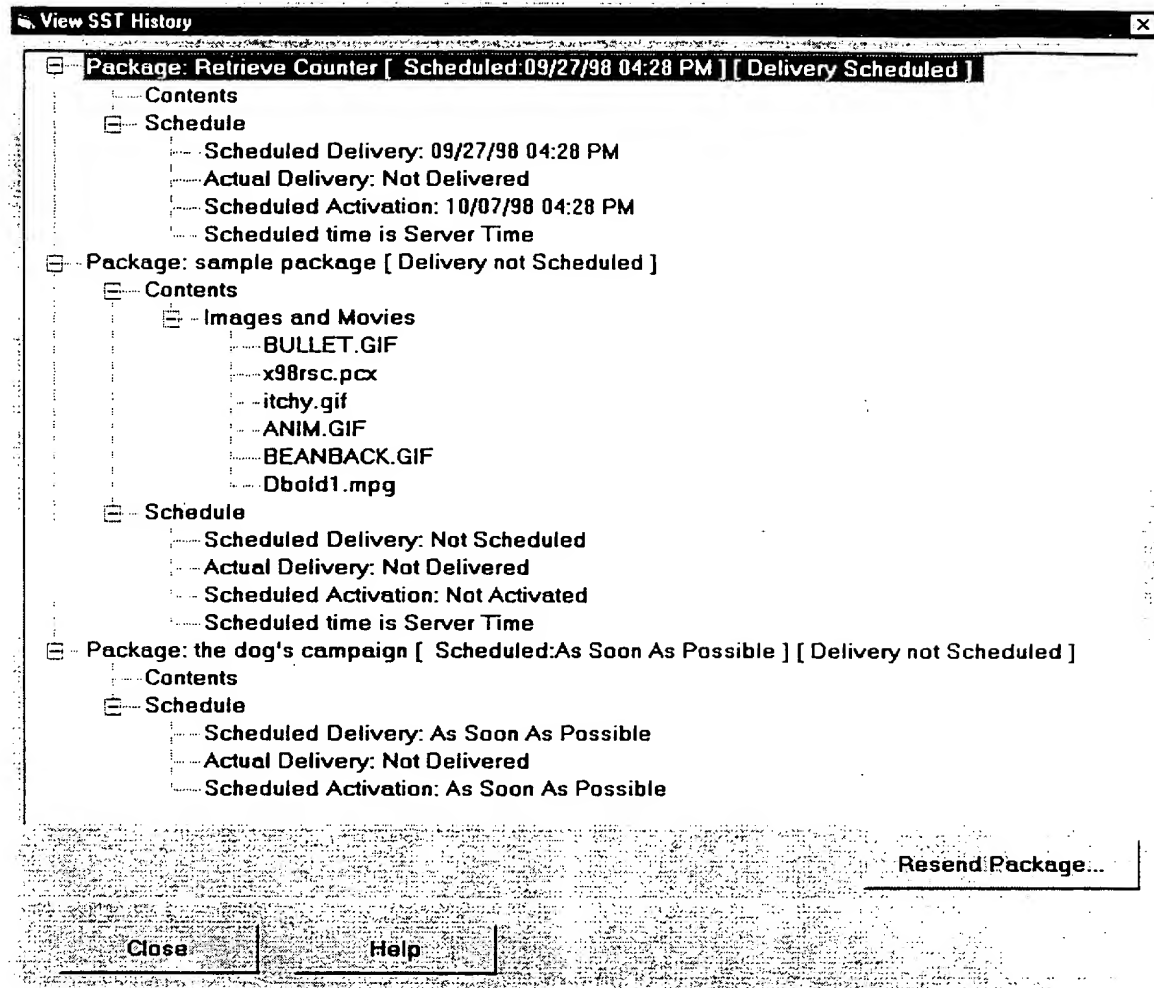View Retrieved Files

Close   Help

FIG 65

View SST History ✕

- **Package: Retrieve Counter [Scheduled:09/27/98 04:28 PM] [Delivery Scheduled]**
  - Contents
  - Schedule
    - Scheduled Delivery: 09/27/98 04:28 PM
    - Actual Delivery: Not Delivered
    - Scheduled Activation: 10/07/98 04:28 PM
    - Scheduled time is Server Time
- Package: sample package [Delivery not Scheduled]
  - Contents
    - Images and Movies
      - BULLET.GIF
      - x98rsc.pcx
      - itchy.gif
      - ANIM.GIF
      - BEANBACK.GIF
      - Dbold1.mpg
  - Schedule
    - Scheduled Delivery: Not Scheduled
    - Actual Delivery: Not Delivered
    - Scheduled Activation: Not Activated
    - Scheduled time is Server Time
- Package: the dog's campaign [Scheduled:As Soon As Possible] [Delivery not Scheduled]
  - Contents
  - Schedule
    - Scheduled Delivery: As Soon As Possible
    - Actual Delivery: Not Delivered
    - Scheduled Activation: As Soon As Possible

[Resend Package...]

[Close]   [Help]

~ 404

FIG 66

View Reports

Start Date

Set to Today

January 1998 | January ▾ | 1998 ▾ |

Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	30	31		2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7

End Date

Set to Today

November 1998 | November ▾ | 1998 ▾ |

Sun	Mon	Tue	Wed	Thu	Fri	Sat
25	26	27	28	29	30	31
1	2	3	4	5	6	7
8	9	10		12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	1	2	3	4	5

Report
- ⦿ Coupon Counts
- ◯ MPEG Metrics

Destination
- ⦿ Preview
- ◯ Printer

OK   Cancel   Help

~ 410

FIG. 67

SST Management ☒

Self Service Terminal List

Name	Terminal ID	Location	Configuration	Merchant
jbm one	1	Test Example	asdfasfd	Merchant Example
⚲ LAB SST for Test	1	Test Example	SST In LAB	Merchant Example
⚲ NEW TEST SST	120987	Test Example	JBM f.s. one	Merchant Example
⚲ Ralphs ATM	123	Test Example	JBM f.s. one	Merchant Example
⚲ jbm two	2	Test Example	JBM f.s. two	Merchant Example

294

292

SST List
Active: 5
Inactive: 0

Merchant and Location
Edit Location List...   *296*
Edit Merchant List...   *298*

Add...   Edit...   Delete

Close   Help

FIG 68

Self Service Terminal ☒

Name and Connectivity

☑ SST Active

Name: [_____]

Terminal ID: [_____]

○ Touch Tone Telephone Dial
○ Pulse Telephone Dial

Modem Telephone Number (dial string):

[_____]

Feature Set Selection

[JBM f.s. one ▾]

Feature Set Description

| feature set one ▲ |
| graphic - dons graphic |
| graphic - asdfsdf |
| movie - test |
| movie - another movie |
| movie - test again ▼ |

[Define New Feature Set...] [Edit...]

Location

[Test Example ▾]

Location Description

1234 Test Street ▲
Testville ZZ 99999
Mr. Test
123-456-7890
<None> ▼

[Define New Location] [Edit...]

Defined Keywords for this SST

[▾]

[▾]

[▾]

[▾]

[OK] [Cancel] [Help]

302

304

300

FIG 69

Location Selection

Name	Address	Address	City	State	Zip Code
BP Gas	4840 SINCLA...		Columbus	OH	43229
BP Gas	681 US HIGH...		Aberdeen	OH	45101
BP Gas	1 MAIN ST		Greenwich	OH	44837
BP Gas	807 HARTFO...		Canton	OH	44707
Chapel Hill Mall	2000 BRITTA...		Akron	OH	44310
Location Example	0000 Locatio...		Locatio...	ZZ	99999
Location3n	Location3a1		Locatio...	OH	3
Location5n	Location5a1	-	Locatio...	OH	5
McDonald's	14615 PEAR...		Cleveland	OH	44126
McDonald's	4621 MISSIO...		San Fra...	CA	95115
McDonald's	5454 MARKE...		San Fra...	CA	95116
McDonald's	112 DUEBER...		Canton	OH	44720
McDonald's	3109 CLEVEL...		Canton	OH	44707
Shell Gas	516 W PERKI...		Sandusky	OH	44870
Shell Gas	123 HOW AVE		Akron	OH	44305
SQA Test Floor	5995 Mayfair ...	-	North C...	OH	44720
Summit Mall	3265 W MAR...		Akron	OH	44333
Test Example	1234 Test Str...		Testville	ZZ	99999
testbla	54545		AKRON	CA	44112
Wendy's	1126 E TALL...		Akron	OH	44310
Wendy's	13246 CEDA...		Cleveland	OH	44112
Wendy's	3239 S ARLI...		Akron	OH	44312

/330

Add... **Edit...** **Delete...**

Close **Help**

FIG 70

Location Add/Edit

Name and Address

Location Name:

Address:

City:

State:

ZIP Code:

Country:

Timezone Selection

EST (Eastern Standard Time)

Contact

Name:

Phone:

Name:

Phone:

Merchant Selection

Merchant Example

Merchant Description:

0000 Merchant Street
-
Merchantville OH 99999

Define New Merchant... **Edit...**

/328

OK **Cancel** **Help**

FIG 71

Merchant Selection ☒

Name	Address	City	State	Zip Code	
BP GAS STATION	BP gas station addr1	Cleveland	OH	44240	
DeBartolo Group	123 anystreet	Youngstown	OH	12345	
Engineering Syste...	Here and Now	Cleveland	OH	44214	
First Bank	100 Franklin St	Chicago	IL	12345	
MCDONALD'S	5353 ATLANTIC AVE	Long Beach	CA	90808	
Merchant Example_	0000 Merchant Street	Merchantvi...	ZZ	99999	
Merchant1n	Merchant1a1	Merchant1c	OH	1	
Merchant2n	Merchant2a1	Merchant2c	OH	2	
Merchant4n	Merchant4a1	Merchant4c	OH	4	
SHELL GAS STAT...	5991 GLENWAY AVE	Cincinnati	OH	45238	
WENDY'S	623 E MARKET ST	Akron	OH	44312	

[Add...]   [Edit...]   [Delete]

[Close]   [Help]

— 332

FIG 72

Merchant Add/Edit   ☒

Name and Location

Name: _____

Address: _____

_____

City: _____ ▼

State: _____ ▼

Zip Code: _____ ▼

Country: _____ ▼

Contact

Name: _____

Phone: _____

Name: _____

Phone: _____

/ 334

| OK | Cancel | Help |

F1G 73

Feature Sets

Name	Description
Coupon	
Coupon rule	
Coupon Select	
Coupon selection	
Couponing4	Rule based and selection
Couponing8	Rule based and selection
Graphic	Graphic Display
graphic	
Graphic 2	Welcome Icons
JBM Feature set	Sample feature set
JBM5	
JBMII	
jbmii	
JBMII F.S.	my sample
new	
new	
new	

_306_

_308_

Add   Edit   Delete

Close   Help

FIG 74

Feature Set Name Selection

Feature Set Name:

Description: _312_

_310_

OK   Cancel   Help

FIG 75

Feature Set Definition

Feature Set Name: IBM f.s. one

Description: feature set one

SST Hardware Features

Video Mode: VGA+

☑ Touch Screen Present

☑ Thermal Printer Present

SST Feature Selection

Available Feature Types:

Name
coupon_rules
coupon_selection
graphic
local_screen_file
local_state_file
movie

Add >>

Currently Defined Features:

Name	Type	Description
another movie	movie	Ralphs Movie
asdfsdf	graphic	
dons graphic	graphic	test
dons test	coupon_selection	test
state file	local_state_file	
test	movie	test
test	local_screen_file	test
test again	movie	

Delete | **Edit Feature Definition...**

Close | **Help**

— 314

F₁G 76

Rules Based Coupon Feature Definition

Rules Based Coupons Identification

Coupon Feature Name:

Description:

— 316

OK | **Cancel** | **Help**

F₁G 77

Coupon Selection Feature Definition

Coupon Identification

Coupon Selection Feature Name:

Description:

Destination Configuration Filename: 000   CPSEL000.INI

☐ Touch Screen ICONS

Icon Numbers Referenced in Coupon Selection Screen

Available Buttons: Eight (8)

Active
A High Resolution
B High Resolution
C High Resolution
D High Resolution

Active
F High Resolution
G High Resolution
H High Resolution
I High Resolution

OK   Cancel   Help

318

Fig 78

Graphic Feature Definition ✕

Graphic Identification

Graphic Feature Name: _____

Description: _____

ICON Number (Referenced from SST Screen) [000]

Image Resolution: ⦿ High   ○ Low

Is this a Touch Button Graphic?   ○ Yes   ⦿ Image when button is pressed
                                   ⦿ No   ○ Image when button is not pressed

[OK]   [Cancel]   [Help]

~ 320

FIG 79

Local Screen File Feature Definition ✕

Screen File Identification

Screen File Feature Name: | test

Description: | test

[OK]   [Cancel]   [Help]

~ 322

FIG 80

Local State File Feature Definition ✕

State File Identification

State File Feature Name: | state file

Description: | _____

[OK]   [Cancel]   [Help]

~ 324

FIG 81

Video Feature Configuration [x]

Video Identification

Video Feature Name: | test again

Description:

Video Format

- ( ) FLC Video File Format
- ( ) FLI Video File Format
- (•) MPG (MPEG) Video File Format

Video Type

Video Type:
- ( ) Single movie
- (•) MPEG Channel File (1 to 3 movies together)

Filename (Referenced from SST Screen): | TEST.chn |▼|

| OK | | Cancel | | Help |

326

FIG 82

Access Management ✕

Currently Defined Users

Name	Role
abbruzt	Administration
admin	Administration
market	Marketing
me	Marketing
newMarket	Marketing
NewUser	Marketing

◄   ►

~ 406

Add...	Edit...	Delete

Close	Help

FIG 83

User Properties ✕

Name:

Password:

Password (retype):

Role Selection

Role	Description
Administration	Administrative Role
Marketing	Marketing Role

◀ ▶

OK   Cancel   Help

~403

FIG 84

iqCRM

File Window Help

iqManager
idESD
idCRM

Marketing Segment
Campaign Design
Campaign Management
Products
Customers
Customer Portfolio
Policy
Reports

Request Name	User Na...	Scheduled Activati...	Campaign Status	Scheduled Delivery
Dons TEST	Admin		Delivery not Scheduled	07/07/1999 11:39:00
Dons TEST-All	Admin	03/09/2002 18:00:00	Delivery not Scheduled	07/08/1999 14:26:00
Genes Test	mourzie	07/08/1999 14:26:00	Delivery Scheduled	07/22/1999 14:44:00
gm1	Admin	07/22/1999 14:44:00	Delivery not Scheduled	07/08/1999 14:20:00
gm2	mourzie	07/08/1999 14:20:00	Delivery Scheduled	05/28/1999 10:47:00
gm3	mourzie	06/24/1999 00:27:00	Delivery Scheduled	08/06/1999 16:31:00
Retrieval 08/23/1999 0...	mourzie	08/23/1999 14:57:13	Delivery Scheduled	08/05/1999 14:58:00
Retrieval 08/23/1999 0...	mourzie	08/23/1999 14:59:25	Delivery Canceled	08/24/1999 23:49:00
Rollback 08/24/1999 1...	mourzie	08/24/1999 11:49:35	Delivery Scheduled	08/24/1999 12:25:00
Snapshot 08/24/1999 1...	mourzie	08/24/1999 11:46:07	Delivery Canceled	07/22/1999 14:46:00
test	Admin	07/22/1999 14:46:00	Delivery Scheduled	06/29/1999 16:21:00
test1	Admin	06/29/1999 16:21:00	Delivery not Scheduled	

Ready

FIG 85

522

570

FIG 86

526

FOURTH FINANCIAL

Happy Anniversary Ross

Would you like to send your wife a dozen roses for only $10 complements of Fourth Financial?

Yes

No

Fig. 87

DW -- database
marketing segmentation

① 506

TCP/IP

MARKETING
server

② market message

customer card
information

504

508

Transaction Server

518

③ Customer ID

514

④ 1:1 message

508

marketing
campaign
distribution
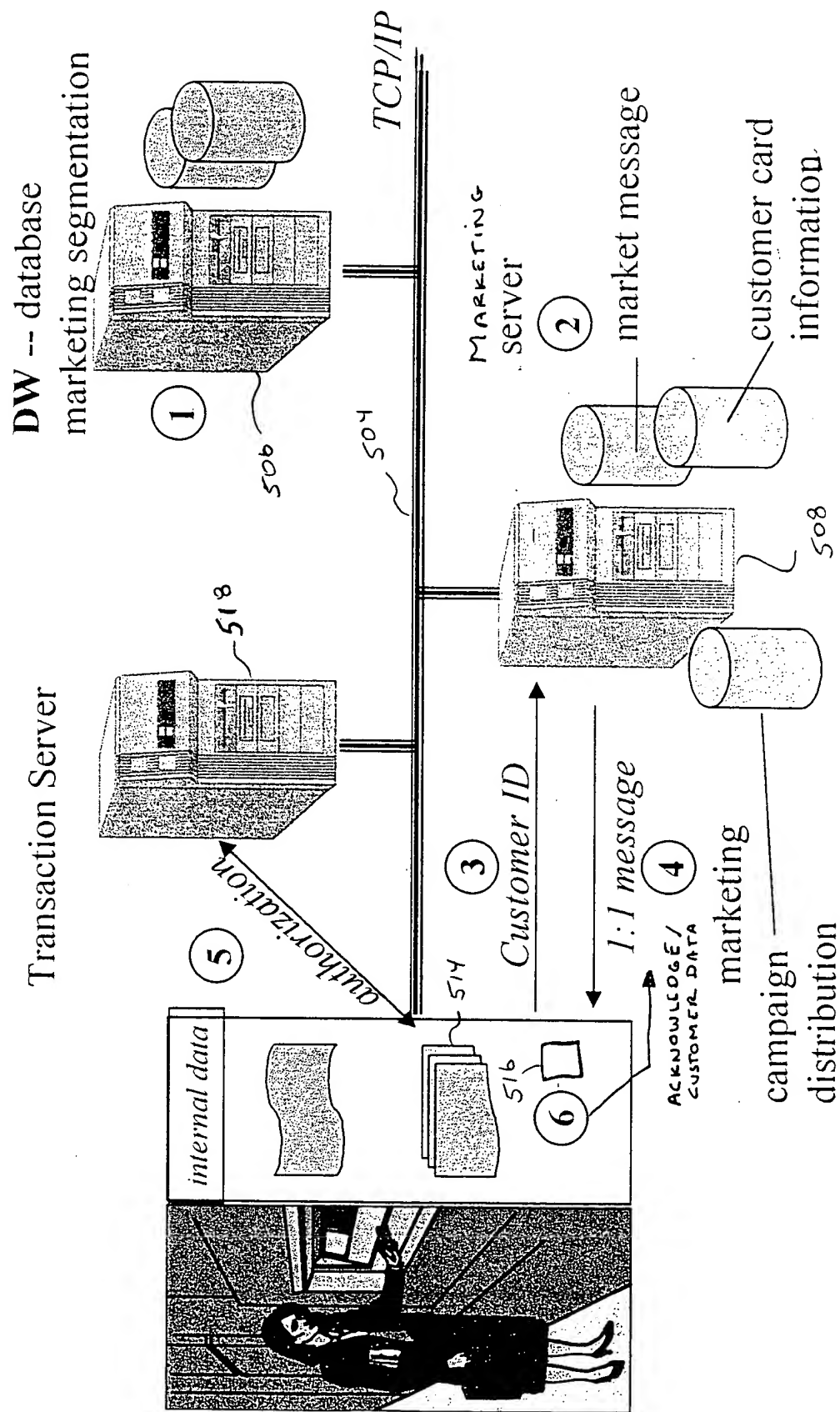
⑤ authorization

internal data

516

⑥

ACKNOWLEDGE/
CUSTOMER DATA

Fig 88

BACK OFF-CE

iqESD

Enterprisewide
CRM System

516

506

FiG 89

Oracle
Database

iqCRM Server

508

iqCRM Adm Client

512
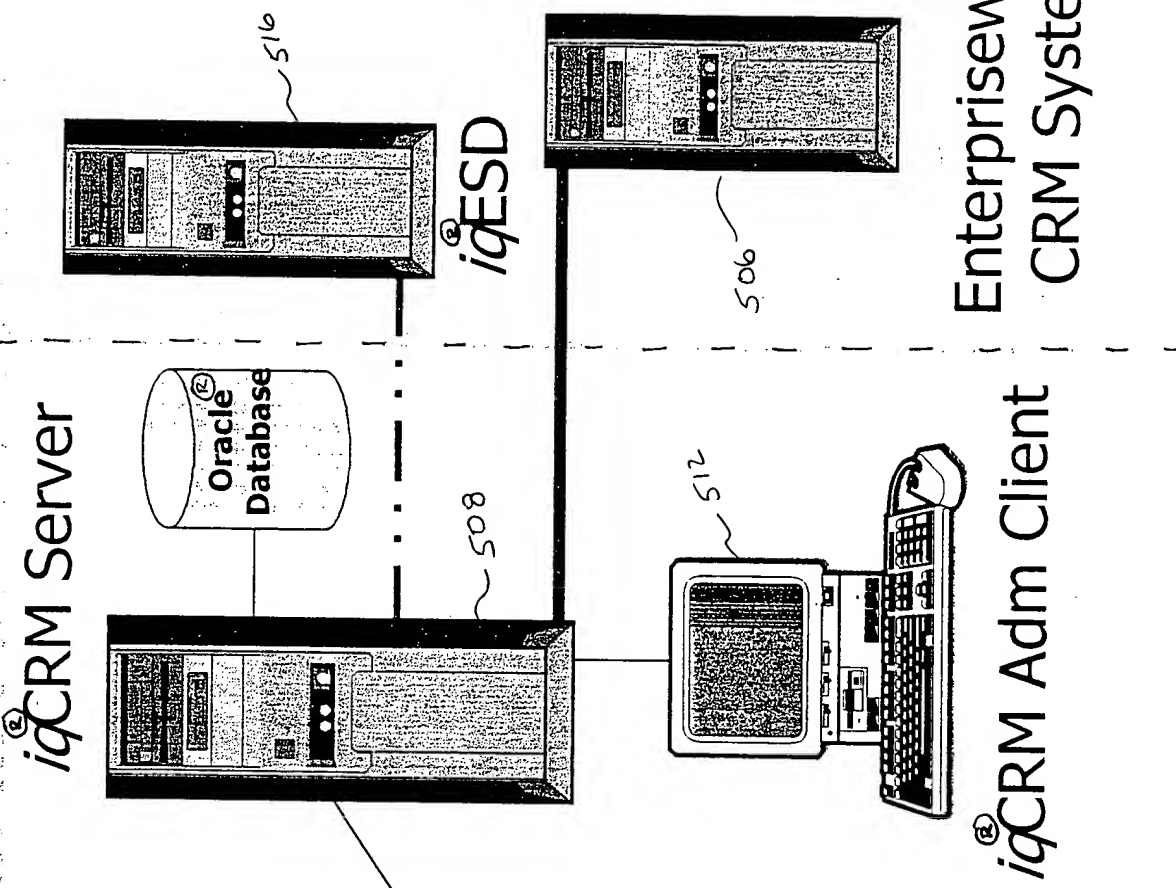
iqCRM
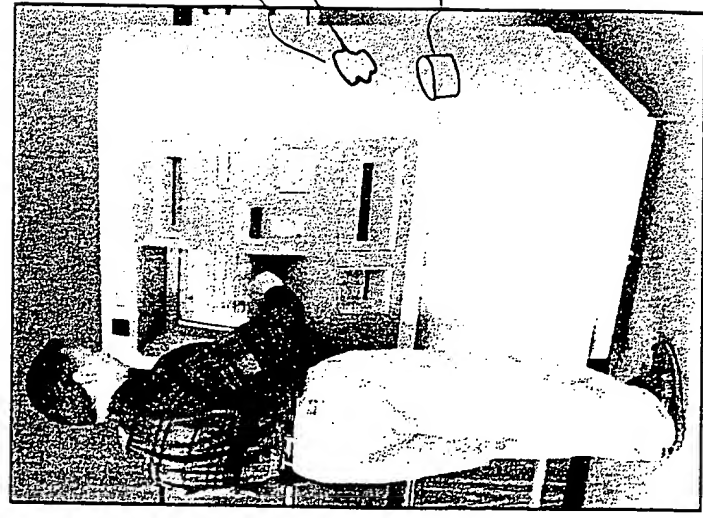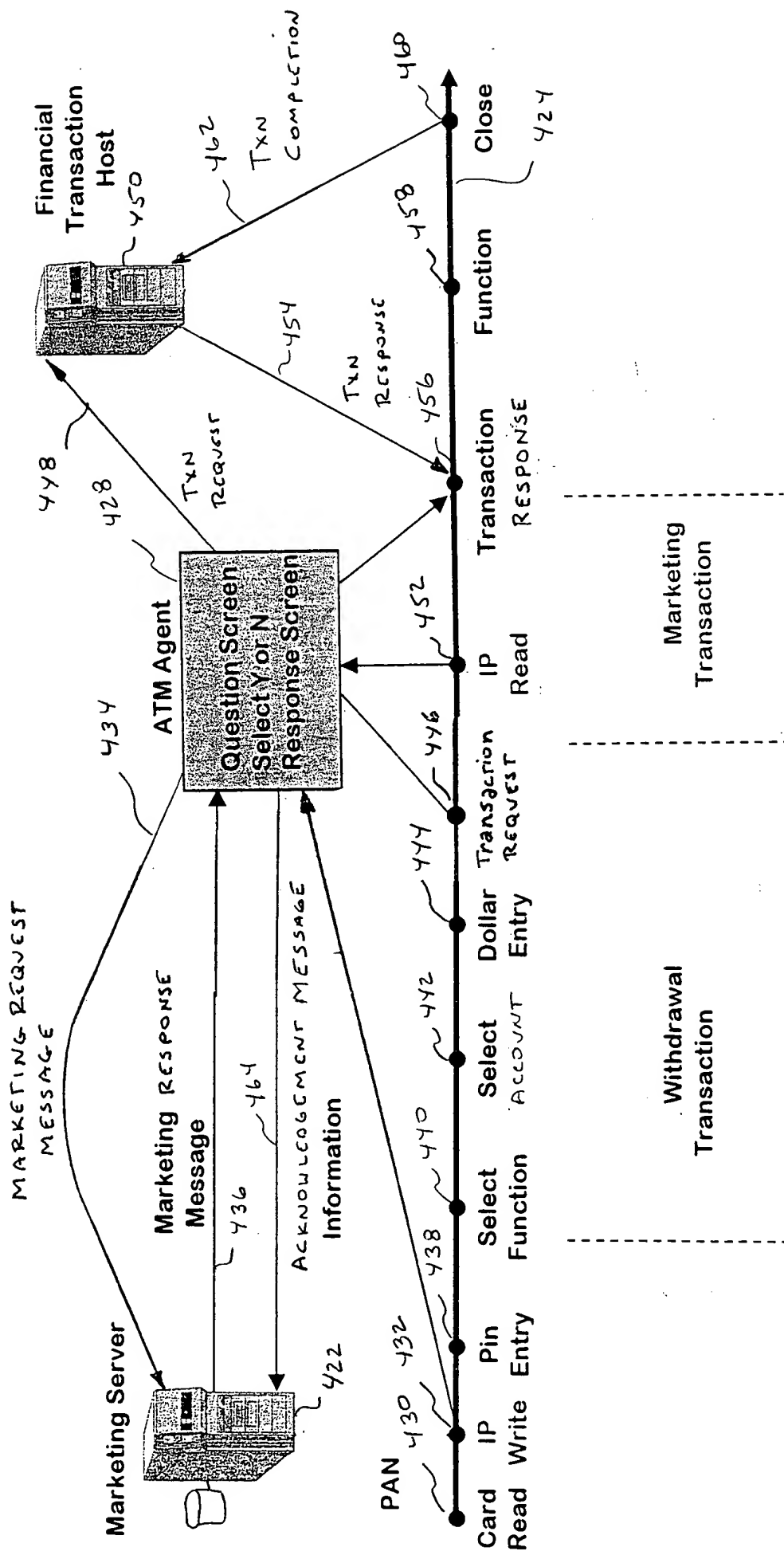
FIG 90

Consumer inserts bank card at ATM

426
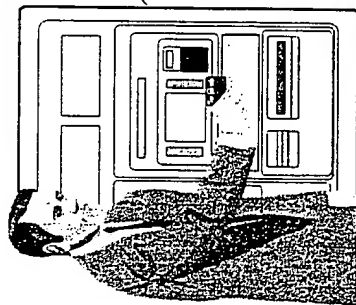
Card Inserted

Marketing Request is sent 434

Server selected Marketing Campaign 436
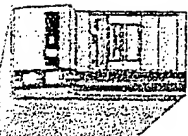
422 Financial Host

Marketing Server

Fig 91

Customer request goes to Authorization Host 448

Consumer enters PIN, selects Withdrawal transaction and enters $60 amount. Consumer is shown standard "Please Wait" screen
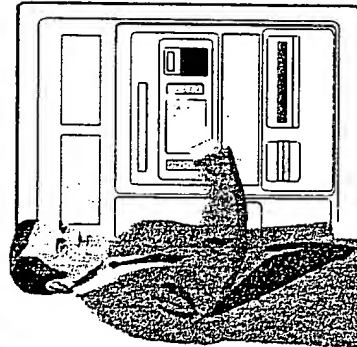
$60 Withdrawal

450 Financial Host

Marketing Server

Fig 92

Fig 9
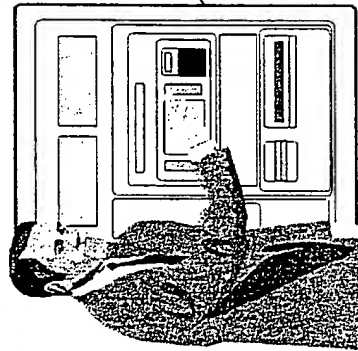
Consumer is shown campaign and interactively responds

FINANCIAL Host

MARKETING Server

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Campaign Display and Response

Fig 9y
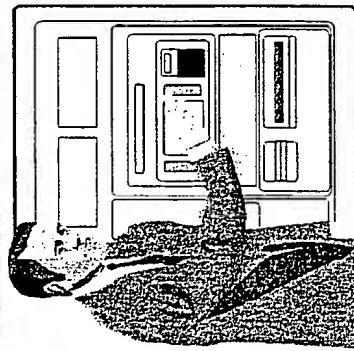
Consumer receives either further information on screen or confirmation that response was received by a thank you message appearing on screen.

Consumer response data sent to MARKETING SERVER

461

FINANCIAL Host

MARKETING Server

422

Marketing Session Ends
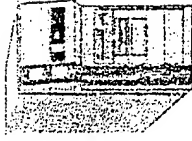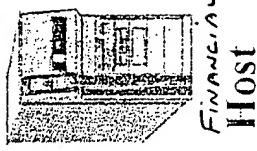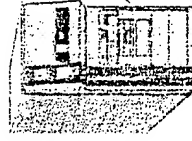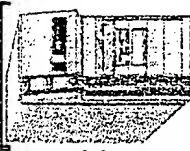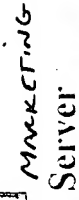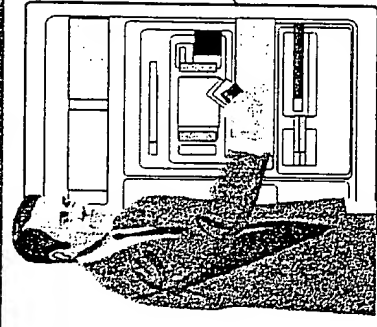
Transaction Approval comes from the Host
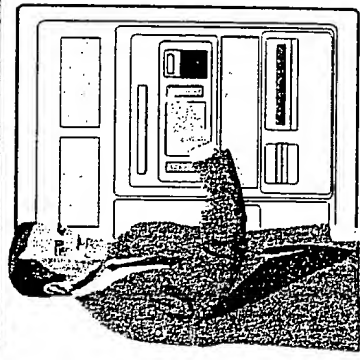
Consumer completes transaction, takes money

454

450 — FINANCIAL Host

MARKETING Server

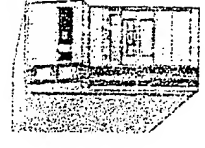426
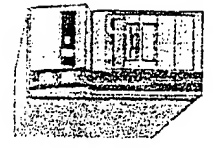
Transaction Complete

Fig 95

Last transaction completion goes to host

462

Consumer may select another transaction of "I'm Finished."
Consumer selects "I'm finished."

450 — FINANCIAL Host

MARKETING Server

End of ATM Transaction

Fig 96

Marketing Server

Financial Transaction Host 496

ATM Agent 472

Question Screen
Select Y or N
Response Screen

MARKETING REQUEST MESSAGE 474

Marketing Response Message 478

ACKNOWLEDGEMENT Information 476

466

490

470

468

PAN

Card Read

IP Read

IP Write

Pin Entry

Select Function 480 482

Select Account 484

Dollar Entry 486

IP Read 488

Transaction Request

Function Command

Close

TXN REQUEST 494

TXN RESPONSE 492

TXN Completion 502

498

500

Withdrawal Transaction

Marketing Transaction

FIG 97